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ABSTRACT

This handbook, which was developed for federal managers, explains how low-cost and no-cost training methods developed in the private sector and the services and support available from federal human resource development (HRD) offices can be used to build a smarter and more productive work force. Presented in part 1 are the following: seven questions to help managers determine whether their workers are continuously learning and transforming themselves to solve new problems and achieve new goals; overview of the findings of the 1993 report of the Vice President's National Performance Review; and examples of the results of a commitment to workforce learning in the private sector. The following strategies for getting better results from training are discussed in part 2: eliminate barriers; set up individual and organizational learning strategies; get strategically aligned; and make a plan. The following ways of getting support for HRD activities are examined in part 3: look to employees for support; look to executive leaders for support; look to HRD offices for support; use outsourcing and collaboration; use the ideas of others; and keep an eye on the future. Endnotes and a list of quoted sources contain 53 citations. (MN)

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Through
LEARNING

JUNE 1997

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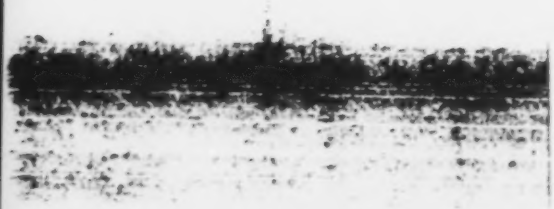

THE VICE PRESIDENT
WASHINGTON

June 23, 1997

A Message to Federal Managers:

President Clinton and I called the new Cabinet to Blair House in January, 1997, to give them their reinvention marching orders. We published these as *The Blair House Papers*.

We asked each Cabinet Secretary to set clear uplifting goals, and make sure everyone understands how the goals relate to their own jobs. We also told them the most important job for government leaders at every level is to unlock the unused creativity and brain power of the men and women in the federal workforce.

You play the central role in this effort. I need your help to introduce a climate for learning in every government organization. This little book, *Getting Results Through Learning*, can help you do it. Its techniques have been widely used in the private sector, where such major corporations as Motorola, Ford, 3M, and DuPont have built constant learning into their everyday business. You can start now, and you don't need to find more money.

Open it. Read it. And try it. Federal workers want to make a difference. This book can help you engage them in the important work of learning and reinvention.

Al Gore

AG/bs

ACKNOWLEDGMENTS

This handbook was authored by a special task force of the Human Resource Development (HRD) Council. The HRD Council — a group of officials from 22 major departments and agencies nominated by the President's Management Council — works in partnership with the Office of Personnel Management to develop strategies, policies, and programs that support individual and organizational performance across the federal government.

We are indebted to the leadership and support of the HRD Council Executive Committee, especially the co-chairs, Melinda McMillon Darby, Department of Defense, and Roy Tucker, Department of Health and Human Services. Dr. Lex Dilworth and his graduate students from Virginia Commonwealth University provided valuable ideas and resources. Finally, we wish to thank the dedicated professionals who helped us edit and produce the handbook: Nita Congress, Denise Meares, Mary Anne Mulligan, Barbara Ruffino, and Jim Smith.

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FOREWORD

"In the knowledge society the most probable assumption for organizations, and certainly the assumption on which they have to conduct their affairs, is that they need knowledge workers far more than knowledge workers need them."

— Peter Drucker

Human capital. Continuous learning. Outcomes vs. outputs. Strategic alignment of human resources. Performance and results. These terms reflect a new orientation for federal managers, an orientation that recognizes:

- that the federal government is the nation's largest employer of college graduates, professionals, and technical experts — a **knowledge-intensive** enterprise even more dependent on its knowledge workers than is corporate America; and

- that, as Thomas A. Stewart notes in *Fortune* magazine, "[This is] the age of intellectual capital, and the most valuable parts of jobs are the human tasks: sensing, judging, creating, building relationships."[1]

How are you managing for results in the face of these challenges? How are you making sure you get the requisite

brain power for the results you need? And how do you do this while you struggle to do more with less?

The answer does not lie in finding more money or making more time for training. And it's not about recruiting the best and brightest. These are not realistic alternatives for the government manager — nor are they necessary.

This handbook shows managers how to transcend these narrow views and discover a new world of rapid, low-cost or no-cost ways to build a smarter workforce and keep it that way. For, as Thomas Stewart writes, "Intelligence, like any asset, needs to be cultivated in the context of the action. Random hiring of Ph.D.s won't cut it."[2]

In this handbook, you will find many steps you can take on your own to get results through learning. You will discover how to build new social forms of learning, and amass and concentrate human capital where it is needed. You will also find out about the services and support managers can and should expect from federal human resource development (HRD) offices.

Training professionals in these HRD offices should also read this handbook in order to get a better appreciation

of the learning-related needs and expectations of managers. As the practitioners of HRD for the federal workforce, they need to be able to provide expert consultation to managers, anticipate managers' performance requirements, and help managers achieve results.

Recent data show that learning in the workplace is the single most important contribution to improving productivity. Government managers and HRD practitioners have the power to get results through learning by adopting the practices in this handbook and focusing on the business objectives of their organization.

There will never be a more opportune moment than now to begin this effort; the demands of the workplace will only continue to escalate. Daryl Conner puts this moment into perspective in *Managing at the Speed of Change*: "You have more control and less ambiguity today than you are likely to have for the rest of your life."[3]

* * *

I

ARE YOU GETTING THE RESULTS YOU NEED?

As a manager, you need results from a workforce that is knowledgeable, flexible, efficient, and resilient. Are you and your employees continuously learning and transforming yourselves to solve new problems and achieve new goals? Or are you less than satisfied with the learning and performance of your staff? Take this questionnaire to find out where you stand.

Think about your own organization as you answer these questions.

1. *Are you facing more work with less staff?*

2. *Do you and your employees need to update technical skills, or learn new ways of doing business?*

3. *Is it difficult to find the time or money to send someone to training?*

4. *When you do send someone to training, do you often wonder if it was worth it?*

5. *Have you searched for ways to learn while on the job?*

6. *Do you find your staff repeating the same mistakes, or repeating mistakes made by other organizations around you?*

7. *Do you think your staff could learn from each other, and from you, if only there was the time?*

If you answered YES to any of these questions, you will want to read this handbook. Inside are straightforward, easy-to-use answers and approaches to help you develop your staff into a learning community that steadily improves its performance and focuses on results.

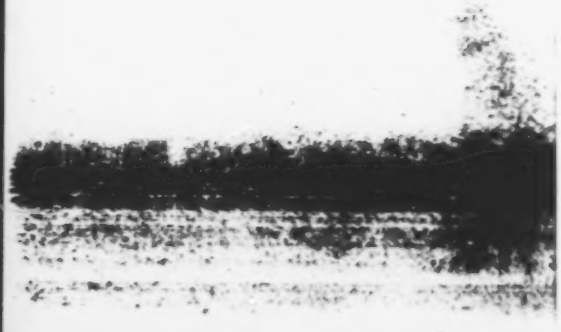
How It Is Now

If you don't have all the answers, you're not alone. Most government offices are not aware of the best ways to develop their employees and thus protect their major investment and primary asset — human capital.

> ***"Managers must come to realize that the accomplishment of their mission objectives in the future may well rest on learning to use their HRD resources in new ways."***
>
> **— Merit Systems Protection Board**

Often leaders do not know how much or what kind of training is directed toward their organizations real priorities. The 1993 report of the Vice Presidents National Performance Review found the 1989 Volcker Commission's conclusions in this area still relevant:

> With few exceptions, most federal training is voluntary, individually focused . . . and bears little discernible relation to major agency objectives and missions . . .
>
> Agencies are not sure what they should train for (short term or long term), who should get the lion's share of resources (entry level or senior level), when employees need additional education (once a year or more often) and whether mid-career education is of value . . .
>
> At both the career and presidential level, training is all-too-often ad hoc and self-initiated . . .



The Merit Systems Protection Board, in a 1995 study on human resource development (HRD) in the federal government, found that:

- Employees were sent to training for a variety of reasons not always related to performance needs.
- Many employees reported not receiving the training they needed to perform their jobs.
- Budget constraints were only part of the problem. More serious were the findings that training needs assessment procedures were often inadequate, and training was rarely linked to strategic planning for the organization.
- Some HRD specialists did not have the skills to support management in meeting organizational needs.

In its recommendations, the Board noted that

> many organizations in the Government will have to fundamentally change the way they have looked at training and development . . . Managers must come to realize that the accomplishment of their mission objectives in the future may well rest on learning to use their HRD resources in new ways.[6]

Clearly, government offices are **not** going to get results when training is used as a tactical event, doled out on a first-come-first-served basis, or treated as a reward or high-cost "perk" for top leaders and professionals.

Learning must be strategically managed to achieve the objectives of the organization and ensure the full utilization of the workforce. Particularly in times of constrained resources, training dollars must be targeted for the biggest payoffs.

Most managers are only just realizing that they are the ones who have the business knowledge and the power in and across their own units to introduce new learning processes that will get results. They should be "getting everybody from the top of the human organization to the bottom doing things that make the business successful."[7]

2 How It Could Be

In the private sector, those corporations that have made a significant commitment to workforce learning are realizing equally significant benefits.

- Major corporations such as Motorola, Ford Motor, 3M, Federal Express, and Shell Oil have succeeded by continuously learning, by constant questioning and reflection and redefinition. Shell Oil managed the 1986 oil crisis far better than other oil companies because of its learning practices in building scenarios and strategic planning.[8]

- Motorola calculates that every $1 spent on training delivers $30 in productivity gains within three years.[9]

- Corning reports that its upfront investment in training has "a payback that is quite impressive." Productivity is up, profits are up, defects and waste are down.[10]

- Skandia, Dow Chemical, and Hughes Aircraft deliberately measure and manage the knowledge assets of their companies and have shown that enhancing knowledge assets improves financial performance.[11]

- GE targets its training budget with precision, and invests in "work-outs," corporate town meetings to solve organizational problems. "When an industry is in turmoil, productivity and people become the name of the game. That's where we get our edge."[12]

"The only ideas that count are 'A' ideas. There is no second place. That means we have to get everybody in the organization involved. If you do that right, the best ideas will rise to the top."

— Jack Welch
CEO, GE

- A recent American Management Association survey of 1,003 large and mid-sized corporations showed that companies that increased their training after announcing layoffs were twice as likely to report improved profits and productivity as the firms that didn't invest in training. Among those that expanded training, 79 percent boosted long-term profits and 70 percent raised productivity.[13]

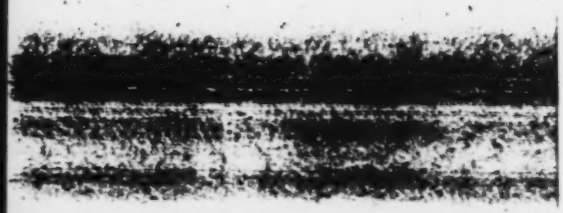
* A study by the National Center on the Educational Quality of the Workforce at the University of Pennsylvania found that a dollar invested by a company in employee education was more than twice as effective in boosting the firm's productivity as a dollar invested in new machinery.[14]

Like their corporate counterparts before them, government leaders now face their own turbulence of reinvention, downsizing, and the heavy loss of knowledge workers through retirement. At the same time, the Government Performance and Results Act makes every agency accountable for strategic planning, measurement, and accomplishment of objectives.

These are all compelling reasons to find new ways to tap human capital to increase performance and productivity. President Clinton and Vice President Gore underscored the importance of unlocking the enormous human potential of the federal workforce in the recent *Blair House Papers*, their reinvention "marching orders" to the Cabinet.[15] Since learning is the essential process in expanding the capabilities of people and organizations, the next chapter outlines some approaches to learning that will give managers results.

II

GETTING BETTER RESULTS



In order to get better results in the workplace, managers must adopt a new perspective on learning. This means understanding the difference between "training" and "learning."

Training is a term that has been used over the years to refer to instructors teaching individuals by presenting structured content in a controlled classroom environment. Recently, with the introduction of computers and distance learning technologies to the workplace, the term has taken on a broader meaning to include on-the-job training and technology-based training.

"Personally, I'm always ready to learn, although I do not always like being taught."

— Winston Churchill

Learning, by contrast, is a much larger umbrella that covers all our efforts to absorb, understand, and respond to the world around us. Learning is social. Learning happens on the job every day. Learning is adapting, and it is vital for the survival and well-being of individuals as well as organizations.

Traditional training has structure and boundaries. Learning can break through boundaries to expand or reconfigure knowledge in new ways. The Canadian Centre for Management Development, in a report on continuous learning, puts it this way:

> Training is something that is done to you, or that you do for someone else. Learning is something you do to and for yourself. Training implies that something already known is to be transferred to someone else. Learning, by contrast, implies a process of self-directed exploration and discovery, in search of something not yet known, something yet to be found.[16]

In the government, traditional training has been the function of the human resource development (HRD) practitioner in the personnel or training office. Managers have typically contributed to the training process by identifying their employees' training needs, initiating training requests, and sending employees to agency training programs.

"Once a company has adapted to a new environment, it is no longer the organization it used to be; it has evolved. That is the essence of learning."

— Arie de Geus
Harvard Business Review

This situation is reversed for learning. That is, managers must take the lead in setting up the environment for learning, and HRD practitioners must contribute support. The remainder of this chapter lays out a roadmap for you to:

- ***eliminate the barriers to learning,***
- ***set up individual and organizational learning strategies,***
- ***get strategically aligned, and***
- ***make a plan.***

Eliminate Barriers

Before any meaningful learning can be initiated, five principal barriers must be overcome. As identified by R.L. Dilworth, these are:[17]

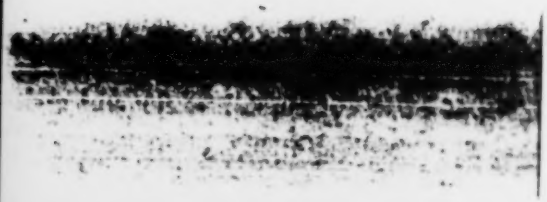
- treating learning as an individual phenomenon, rather than as something that can also involve groups of people;
- focusing on formal training, rather than attending to informal workplace learning;
- keeping business and learning processes as entirely discrete worlds;
- tolerating "nonlistening" work environments; and
- employing autocratic leadership styles.

These barriers exist in many government organizations, and unless they are removed, organizations cannot be designed to learn.

You have considerable power to make the necessary changes in

"We would not knowingly hire anyone in our company that wasn't 'boundaryless,' that wasn't open to an idea from anywhere, that wasn't excited about a learning environment."

— Jack Welch
CEO, GE



your own organizational unit. For example, you can demonstrate new behaviors and set up new systems that encourage openness and communication. There is much to be gained by breaking down the barriers: the ability to learn is not measured by **what** the organization and manager know but rather by **how** the manager and organization learn.

2 | Set Up Individual and Organizational Learning Strategies

There is a significant difference between individual and organizational learning. Consequently, different strategies are needed for each.

Individual learning is a familiar concept: it is the ability of individuals to experience personal growth in their exchange with the world around them. **Organizational learning** is perhaps less familiar. Certainly, it is a much more recent concept: it is the ability of an organization to gain insight and understanding from experience. Groups and organizations adapt, grow, and change as units to shape their future course.

The idea of organizational learning was popularized by Peter Senge in *The Fifth Discipline: Mastering the Art and Practice of the Learning Organization*.[5] Its publication generated a significant level of interest worldwide. Since then, organizational learning has become highly valued by corporate leaders because of the systems-level learning that occurs when entire organizations address and solve

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problems, build repositories of lessons learned, and create core competencies that represent the collective learning of employees, past and present.

Individual and organizational learning are distinct, but not separate. Individual learning is the foundation of organizational learning, but it does not lead automatically to learning by the organization. As Argyris and Schon put it: "Individual learning is a necessary but insufficient condition for organizational learning."[19] You can use techniques and tools to promote each of these and link them together.

Individual Learning Strategies

There are two types of individual learning: formal and informal. **Formal learning** encompasses all traditional training in structured courses, classrooms, and formal development programs. **Informal learning** is that which takes place in the informal processes of everyday work. Most individual learning occurs informally, rather than through formal training or education.

"The illiterate of the year 2000 will not be the individual who cannot read and write, but the one who cannot learn, unlearn, and relearn."

— Alvin Toffler

While managers can do much to influence and reinforce formal learning, you can have the greatest impact by deliberately creating a climate for informal learning. Here are some

strategies for informal individual learning that, although they cost very little in time or money, have potentially big payoffs:

- ***Job rotations*** — permanent or temporary appointments to new positions. These appointments should be planned to stretch and challenge employees, and to broaden their understanding across different business processes of the organization.

- ***Special assignments*** — tasks or projects given as learning and development experiences. These can be specifically designed to offer opportunities to explore new areas and learn new skills.

- ***Reflecting on experience*** — a process of integrating learning and work to give both conscious attention. Given a special assignment or period of work, an employee is asked to analyze the results achieved, lessons learned, and new opportunities for learning.

- ***Coaching and counseling*** — learning assistance given to the employee through listening, observing, and providing feedback. Managers, team leaders, or senior colleagues are in an ideal position to provide such assistance, and can exploit everyday workplace exchanges into "teachable moments" for maximum learning benefit.

- ***Mentoring*** — oversight of an employee's career development by someone senior to the employee and outside the employee's chain of supervision. Mentors help

employees clarify career goals, understand the organization, analyze strengths and developmental needs, build support networks, and deal with road blocks.

- ***Manager as teacher*** — managers acknowledge their role as teachers and facilitators of the learning process, and regard each interaction with employees as having a learning dimension. Managers consciously teach through their own model, habits, and system of values.

- ***Learning teams*** — teams of four to five people who meet regularly to focus on individual learning to improve their own effectiveness. Teams can form around an area of interest, such as the Internet or public speaking, or around broadly defined career paths.

- ***Self-development*** — a collection of techniques and approaches for individuals to manage their own process of learning. These include self-analysis of competencies and interests, personal development plans, learning contracts, learning logs, reading lists, involvement in professional organizations, networks, attending demonstrations at other organizations, and participating on interagency committees.

"For the bold new world of the 21st century . . . every adult American must be able to keep on learning for a lifetime."

— President Bill Clinton
State of the Union address

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- ***Individual development plan (IDP)*** — a plan developed jointly by the employee and manager that identifies individual goals for employee growth in the context of organizational mission. The plan lists training, education, and development activities (formal and informal) to develop the competencies needed to meet IDP goals.

Organizational Learning Strategies

Organizational learning is still in its infancy within the government, because a history of bureaucracy, compartmentalization, and segmentation has not provided much fertile ground for openness and communication. Yet managers can design organizations that learn and that are able to transform themselves to respond rapidly to technological change, downsizing, and restructuring. And when organizations are designed to learn, the lessons are not lost when individuals leave.

> *"To create human capital, a company needs to foster teamwork, communities of practice, and other social forms of learning. Individual talent is great, but it walks out the door. Interdisciplinary teams capture, formalize, and capitalize talent; it becomes less dependent on any individual."*
>
> **— Thomas A. Stewart**
> ***Fortune* magazine**

Here are some strategies for organizational learning:

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★ ***Meetings*** — time in regular meetings used for learning purposes:

- Time is set aside for presentations from outside resource people giving a different perspective on agenda items. In this way, real business is used for learning and gaining new insights.
- Periodically, a facilitator is brought in to take the group through team-building exercises to improve communication and understanding.
- Employees who are working on special assignments or reading professional literature are asked to make reports.
- In meetings, managers play the role of teacher by asking questions, demonstrating systems thinking, and discussing lessons learned.

★ ***Action learning*** — an actual problem in the workplace used for learning. A group of employees is formed to analyze the problem and consult with experts. The group then returns to the workplace to take action. After a period of time, the group reconvenes to discuss progress and make adjustments. This cycle of action and learning repeats itself until the problem is satisfactorily resolved. Case studies are written up as final reports and become part of organizational history — and required reading for new employees.

★ ***Cross-functional teams*** — individuals with different skills and backgrounds form a team to bring a wide range of viewpoints to accomplish some task. They collaborate on common work issues and learn from one another. Through this, they acquire greater knowledge

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of the complexities of business issues and decisionmaking processes.

- ***Work-outs*** — an organizational equivalent of a town meeting. This technique has been practiced extensively at GE and is credited as a factor in transforming that company into one of the world's most successful corporations. Teams composed of a broad spectrum of employees at all levels meet — without management — to seek answers to business problems. The work-out concludes with a town hall style meeting where teams present their proposals to management. The managers must make immediate, public decisions as to whether to accept or reject the team proposals, or ask for more information by a specific date. The work-out process brings to bear all levels of the organization and encourages open and frank discussion about practical problems.

> ***"The point of work-out is to give people better jobs. When people see that their ideas count, their dignity is raised. Instead of feeling numb, like robots, they feel important. They are important."***
>
> **— Jack Welch**
> **CEO, GE**

- ***Strategic planning*** — groups working together to predict and prepare for their future. Through various planning processes, employees gain insight into the real business goals and priorities of the organization and the value of their contributions. Facilitators can lead a

group through processes to develop mission statements, a strategic five-year vision, expected outcomes, and critical success indicators to measure progress. Building scenarios and analyzing the "what if's" are processes that help organizations prepare contingency plans for a wide range of possibilities in the future. Through strategic planning, organizations learn more about themselves, develop a common language, and chart a direction that is understood and "owned" by everyone.

- ***Parallel learning structures*** — temporary study groups created to open new channels of communication outside and parallel to the normal, hierarchical structure of the organization. The study groups cut across organizational lines horizontally and vertically, define their own boundaries and strategies, and bring new thinking and creative energy to problems that have challenged normal decisionmaking processes.

"Education, learning, and changing are so closely related to problem solving that they may all be names for the same thing."

— George Prince

- ***Corporate scorecard*** — the business equivalent of a speedometer or temperature gauge that tracks measurements that are important to the success of the organization. The scorecard tracks both financial and nonfinancial measures, including customer service, delivery time, improved quality, and other factors that contribute to organizational performance. The

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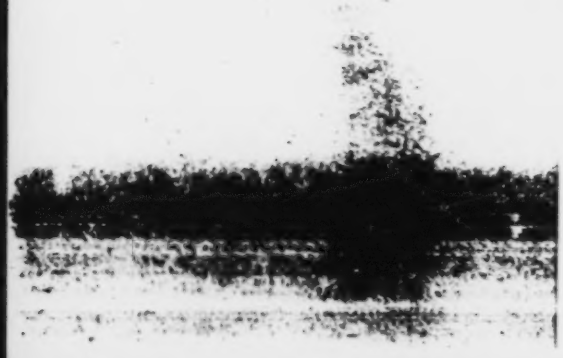
scorecard is distributed across the entire organization so that everyone is reading the same score and can address any given problem from a common ground.

- ***Benchmarking*** — continually comparing your own organization with other organizations. The procedure consists of:

  1. identifying an area of your own organization that needs improving,
  2. scanning the environment to find "model" organizations that have a recognized ability or accomplishment in that area,
  3. studying the practices of this model organization, and
  4. finding those features that can be adapted to work in your own organization.

  Benchmarking is an unending search for best practices that can help an organization improve its own performance.

- ***"Flocking"*** — a technique derived from species of birds that "flock," or assemble together in small groups to learn collectively. These birds learn faster than other birds, and so do organizations that encourage flocking behavior.[20] Team training provides an excellent opportunity for flocking. On-site university programs allow employees to learn together, exchange information on real projects, and establish ongoing networks.



Management development programs bring together leaders from various backgrounds and promote collaboration and communication across organizational boundaries.

★ ***Groupware*** — a computer-based technology that supports a team's communication and decisionmaking processes. The system replaces chalkboards and large poster pads with a projected computer screen image and a series of networked work-stations, each with its own private display monitor. Participants can enter brainstorming ideas, make comments, organize ideas and concepts, make evaluations, and vote for rankings anonymously. Their input is instantly recorded on the projection screen and on the other participants' monitors. The system makes group work substantially more efficient, because less time is spent tabulating comments, rankings, and evaluations; and it gives instant access to a broad range of information about how work is progressing. At the end of any exercise, the computer will print out a series of products that capture the comments, statistics, and rankings of the group.

> *"None of us is as smart as all of us."*
>
> **— Ken Blanchard**

Using groupware only requires a few minutes of training, even to those who are not experienced with computers. You will need an experienced facilitator and an operator to run the computer system tabulations.

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Many agencies are finding the use of groupware pays for itself quickly because of its versatility, speed, and effectiveness in generating interaction and organizing ideas.

- ***Computer conferencing*** — an application of computers and telecommunications for distance learning that provides an "electronic classroom" setting. Employees can interact with each other and with a leader (a coach, facilitator, or instructor) on discussion topics, problems, projects, and questions at their own convenience and at any location. Computer conferencing software can be used to conduct an actual class, complete with instructor, class assignments, and tests. It can also be used for ongoing discussions and reviews of work by project teams whose members are separated by time and space, or who simply have difficulty finding time to meet.

This list of strategies is only a starting point. As you begin to see every workplace exchange and activity as an opportunity for learning, you will generate your own ideas for organizational learning strategies. And, although you must take the lead in learning, managers should look to the HRD office for expert support in designing and implementing individual and organizational learning strategies. The HRD specialists should be able to provide more information about any of the recognized strategies described in this handbook and facilitate learning processes with employees.

10

Get Strategically Aligned

Strategic alignment refers to the correlation between an organization's operations and its mission and goals. Ideally, operations should support and reflect mission and goals. For our purposes, we are here discussing the importance of aligning training and learning activities with the "big picture" — that is, with the organization's overall business strategy. In government, there are several important reasons for ensuring that plans for building human capital are linked to business strategy:

> ***" . . . training [is] a means to an end rather than an end in itself."***
>
> **— John K. Berry**

- First, serious concerns have been expressed in the past that the billions of dollars spent on civilian training are not targeted wisely and do not lead to improved performance.[21]
- Second, with downsizing and restrictions on hiring, new skills will have to be acquired by training as opposed to recruiting.
- Finally, with dwindling resources, limited training dollars are not likely to be increased in the near future.

In short, more must be accomplished with today's existing workforce and today's existing resources.

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You can link learning to performance and organizational results by doing the following:

1. ***Review your agency's strategic plans and objectives.*** Every agency has a strategic plan, as mandated by the Government Performance and Results Act of 1993. This five-year plan describes how the agency will use its personnel, budget, and other resources to accomplish measurable performance goals.

2. ***Determine how you contribute to agency plans and performance requirements.*** What is your core expertise? What do you do best? Draw the relationship between your group's function and the mission, goals, and core competencies of the agency. Examine the ways you are expected to perform and the outcomes you produce. Are there potential new ways you could lead, support, or participate?

3. ***Plan learning that supports your ability to contribute to agency objectives.*** Check the agency annual training plan to identify priority training programs that involve your employees. Determine if your organization has key positions in mission-critical areas that need continuing professional education. Find out if your employees can explain the organization's business strategies and specifics of their own group's performance. Identify the competencies necessary to meet performance goals and the learning activities that build and strengthen them.

4. ***Focus on learning that addresses areas of performance weakness.*** Review the results of your organization's past performance. What are the strengths and weaknesses, and where are improvements needed? Most importantly, what learning can be done that will result in the biggest payoff to the agency in measurable results?

5. ***Create learning objectives that tie into business outcomes.*** Whenever possible, set up learning that directly relates to your organization's critical success indicators. For example, if the organization is measuring cycle time, or output, or customer satisfaction, try to build learning activities or select training courses with related objectives. This helps ensure that the changes in your employees' performance are the ones desired and the ones measured.

6. ***Support the transfer of learning into performance and results.*** On average, less than half of what is learned is actually applied on the job. There is no automatic transfer of new skills into new job behavior. You, as a manager, can influence such a transfer by fostering an environment that gives employees a chance to practice new skills, values innovation, and rewards improved performance.

As always, managers should look to the HRD office for expert support in aligning learning to business strategy. HRD specialists should be able to advise you on how to perform the steps above and to provide you with tools to make assessments and decisions about learning.

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For its part, the HRD office should be taking steps of its own to integrate training and development with all the other human resource functions — recruitment; retention; creation of new positions, work systems, and performance management systems — to align total performance requirements with the agency's mission and goals. When all human resource requirements and priorities have been integrated — when it is known what level of effort will be needed to move the agency forward for each career area, for retraining efforts, for introducing new systems, for reorganization and reinvention, for leadership — managers gain valuable information and insight on the kinds of learning that are strategic. This in turn promotes consistency across all managers striving to link learning to performance and results.

4 | Make a Plan

Recently, an office in a federal agency used its training funds to send several employees to expensive conferences and two executives to long-term executive development programs. Later in the year, when it came time to implement the agency's new automated procurement system, the office didn't have enough funds left in its budget to cover basic training. The office had to delay the use of the system until the next fiscal year, when it could afford to get its employees trained.

"Planning for training and development can't occur in a vacuum."

— Peg Anthony and Lincoln Akin Norton

Situations like this occur across the government.

There's a straightforward way to avoid the "first-come-first-served" mentality that plagues many government organizations in allocating their training dollars: make a training plan. Such a plan is extremely useful for organizing thinking about investments in formal training. With limited dollars to go around, managers need an aggregate perspective to find balance, establish priorities, and separate merely good ideas from business imperatives.

When you plan for learning and training as an organizational unit, you gain powerful advantages and get results. With an annual training plan, you can:

* ***make a connection to the organization's strategic objectives upfront,***
* ***target training areas of greatest need and biggest payoff, and***
* ***find the best and most cost-effective ways to get training.***

Here are basic steps for you to develop a training plan for your organizational unit.

1. Define learning needs linked to strategic plans.

- Identify your contribution to your agency's mission, strategic goals, and objectives (see the strategic alignment steps discussed above).

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- Check into the introduction of new technology and new ways of doing business, both internally and externally.

2. ***Review other information to identify needs.***

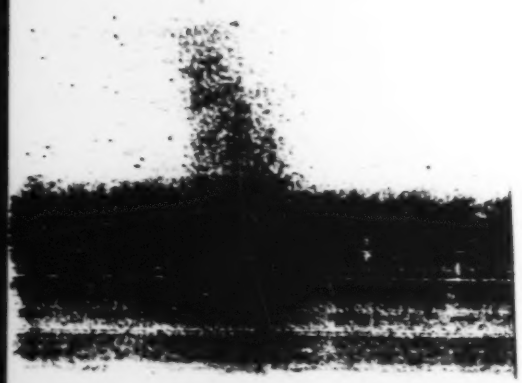
- Review reports, agency "scorecards," etc.
- Check the learning needs identified by employees, customers, and other sources.
- Identify continuing professional education requirements for career programs.
- Determine if your group is fully oriented to the agency's business strategy.

3. ***Validate your list of needs.***

- Ensure that all the needs are **learning** needs.
- Determine if training is an appropriate intervention.
- Figure out how it contributes to the overall solution.
- Rank the requirements in order of importance to the strategic plan.

4. ***Determine the best strategies.***

- Make "business case" decisions based on your resources (time, money, and agency programs and assistance available to you) and potential payoff.



- Consider formal learning options:
  — classroom vs. on-the-job,
  — on-site vs. off-site,
  — customized vs. off-the-shelf (the latter can be acquired and used as is);
  — contractor vs. in-house instructor; and
  — technology-based delivery (computer-based training, satellite broadcasts) vs. classroom instructor delivery.

- Consider informal learning strategies for:
  — individual learning, and
  — organizational learning.

5. Identify potential sources for learning.

- Obtain information from the HRD office on:
  — recognized vendors,
  — partnerships with other organizations, and
  — colleges and universities.

- Check into possible collaborations with other managers.

6. Estimate costs.

- Include tuition, travel, per diem, facilities, contracts, and special equipment.

- Weigh projected costs for different strategies and sources.

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7. Set priorities.

- Select the critical areas that most need addressing and identify the potential payoffs.
- Determine your funding level, and where you must draw the line.

8. Determine how to evaluate results.

- Identify the measurable outcomes you expect to have.
- Make the link between outcomes and business strategy.
- Find a simple way to track progress.

9. Share your plan with employees, customers, and other managers in your organization.

- Generate understanding; promote "buy-in" of the plan.
- Lead by example; demonstrate your commitment to learning for results.

10. Execute and monitor.

- Assign responsibility to implement the plan.
  — Collect evaluation data, including data for baseline measures.
  — Track your group's contribution to the agency's strategic goals.
  — Document success stories.
  — Make needed additions and adjustments to the plan.
- Continuously provide opportunities for employees to apply their learning on the job.

The HRD office can advise managers on developing annual training plans. The HRD staff can provide valuable information on the best resources for training, how to estimate the actual costs of training, and how to evaluate the value of training.

The best HRD offices make organizationwide master training plans — these can be a significant help and resource to managers in making their own plans. HRD master plans link learning and organization strategic plans at the highest level, and describe large-scale training initiatives that contribute to agency goals and performance requirements. You can then build on the platform of these master training plans and fill in the blanks for your own unit.

> *"Human capital grows two ways: when the organization uses more of what people know and when more people know more stuff that is useful to the organization."*
>
> **— Thomas A. Stewart**
> ***Fortune* magazine**

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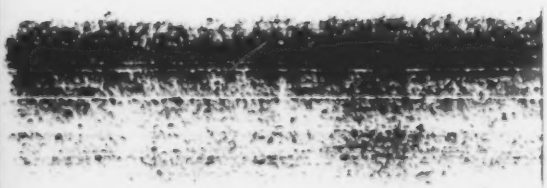
III

GETTING SUPPORT



The manager — as is becoming increasingly obvious to organizational experts — is crucial to the process of learning. Learning takes time, give and take on real problems, systems thinking across boundaries, trial and error, and reflection. Managers are in the best position to:

* involve employees in setting goals,
* structure the chance to learn,
* offer feedback and support,
* provide tools and ideas, and
* stay out of the way.[22]

Peter Senge sees the role of line managers as one of significant responsibility because they have a bottom-line focus and can undertake meaningful change at their level. Moreover, line managers can sanction new experiments to enhance results, and they have the knowledge and practical experience needed to become teachers.[23]

> *"Often the most effective facilitators in learning processes are not professional trainers but line managers themselves."*
>
> **— Peter Senge**

Managers do not and should not work alone and unaided in facilitating the learning process. You can and should

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get support from a wide range of sources. This chapter describes those sources and the types of help they provide. Specifically, you can get support:

- from employees,
- from executive leaders,
- from HRD offices,
- by outsourcing and/or collaborating,
- by using the ideas of others, and
- by keeping an eye on the future.

By being aware of the kinds of support that **should** be available, managers become informed consumers and can knowledgeably lobby for particular support services.

1 | Look to Employees for Support

Employees have a stake in sharing the responsibility with the manager for learning. They are beginning to realize the need for career resilience, that is, for staying on the cutting edge in their fields if they want to be marketable and stay productive.

Employees are also recognizing the value of being multi-skilled, particularly in the downsized, streamlined environment of today's government. With multiple skills, not only do they have more value in the positions they hold,

they can also move more easily across functional boundaries and to different assignments as workloads shift.

Managers can increase employees' awareness of how important it is to update their skills and do whatever it takes to provide value to the organization. This understanding comes when employees become more knowledgeable of business management practices and are treated as trusted members of the team.

"By a career-resilient workforce, we mean a group of employees who not only are dedicated to the idea of continuous learning but also stand ready to reinvent themselves to keep pace with change; who take responsibility for their own career management; and, last but not least, who are committed to the company's success."

— R.H. Waterman
J.H. Waterman
B.A. Collard
Harvard Business Review

You can expect motivated employees to:

- lead work teams, work projects, and cross-functional teams;
- write their own individual development plans, set goals for themselves, and define the steps they must take to meet those goals;
- seek out training and development programs and assignments they know they need to progress in their careers;

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- read books, magazines, and journals that address current issues or needs of the organization, and look for opportunities to apply what they learn;
- serve as coaches, counselors, and mentors to less senior colleagues; and
- identify problems that can be solved with organizational learning strategies.

Managers can promote and promulgate these behaviors by creating an environment in which employees feel secure in making suggestions and by rewarding employees who aggressively seek out learning opportunities for themselves and their organization.

"Security no longer comes from being employed. It comes from being employable."

— Rosabeth Moss Kanter

All employees have a need for lifelong learning, and when they are convinced of the benefits that can be derived from workplace learning activities, they will be enthusiastic helpers and participants in the process.

Look to Executive Leaders for Support

Executive leaders must support and recognize your learning initiatives, build the infrastructure, and create a climate conducive to performance and growth. They support their managers by:

* encouraging work across organizational boundaries;
* rewarding your efforts to experiment and innovate;
* recognizing learning initiatives that produce results; and
* engaging in open, continuous interchange of ideas and information.

"I'll tell you what leadership is. It's persuasion and conciliation — and education — and patience."

— General Dwight D. Eisenhower

Executive leaders can build the all-important infrastructure in the organization to sustain continuous learning by:

* making reference to learning and human capital as part of the organization mission, vision, and values statement;
* identifying the core competencies of the organization;
* institutionalizing a process, which includes the HRD office, to integrate the organization's business strategy with its human capital plan;

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- making major investments in training and development that support strategic objectives;
- creating an organizationwide learning council that oversees the organization's priorities for growth, investment, change, and performance;
- developing policy to preserve or increase investment in human capital during downturns;
- establishing performance management systems that reward managers and employees for achieving learning goals;
- designing flexible structures and processes that facilitate integrated learning in different organizational subsets;
- installing systems to measure the effectiveness of training related to organizational performance indicators;
- funding technology that facilitates communication and learning across organizational boundaries; and
- staffing the HRD function with specialists who can support managers.

Executive leaders can strengthen organizational performance and growth by:

- promoting a climate of openness and truth,
- placing a high value on the generation and rapid dissemination of knowledge,

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- rewarding learning through performance systems from the top down, and
- sharing ownership of results.

Look to HRD Offices for Support

The HRD office and its staff of HRD professionals should be a valuable resource for every facet of learning. Some agency HRD offices, however, are still working to acquire the new competencies and capabilities needed to provide you with learning services. They are in a state of transition, moving from a world made up exclusively of traditional training programs to a new world where training is just one of several modes of learning.

> *"Over the long run, superior performance depends on superior learning."*
>
> **— Peter Senge**

The HRD community is reinventing itself to play new, valuable roles in the organization. For example, when learning moves from the classroom into the workplace, HRD professionals become learning facilitators and advisors to managers. Instead of being in charge of the classroom, HRD professionals are in service to the workplace. They play a strategic role in linking learning to the organization's performance goals. They serve as the protectors and developers of the core competencies of the organization. They thus must understand the business of that organization.

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In the reinvented HRD office, HRD professionals are consultants on organizational change and performance interventions. They know how to develop formal and informal learning activities, and have a good command of new learning tools and technology. They can facilitate work teams, create mechanisms for sharing learning, and assess the value of learning initiatives. They can structure competency-based career systems and needs assessment tools that enable employees to develop along career paths that enhance their contribution to the organization. All the while, these HRD practitioners continue to ensure that the major learning programs throughout the organization follow a standardized instructional systems development process and are linked to organizational goals and outcomes.

The HRD profession has changed because the whole notion of learning has shifted, technology has advanced, and jobs have evolved. It is not surprising that people in the HRD field are highly concerned about developing new competencies of their own and obtaining more training to increase their expertise. They must be proficient in new instructional technologies, team learning strategies, cost benefit analysis, and organizational performance outcome measures, to name but a few of the requisite competencies in the field.

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In sum, then, the HRD office provides support in:

* planning,
* estimating costs,
* selecting,
* designing,
* developing,
* procuring,
* conducting, and
* evaluating

learning at every level of the organization.

Use Outsourcing and Collaboration

The recent emphasis on downsizing the federal payroll has made contracting out for services a very appealing prospect. While it is not a panacea, outsourcing is frequently a highly useful mechanism. But managers need to keep in mind that when they contract out for training — whether for the design, development, implementation, administration, or evaluation of training — they are contracting out the **work**, not the **accountability**. Consequently, managers need to plan carefully and factor the time and costs of managing the resulting

> *"The demands for new knowledge and skills will be constant, no longer a value added element, but the essential factor in determining organizational survival."*
>
> **— Meg Wheatley**

contract. The goal should be to reduce costs, improve productivity, and maintain or develop the capability to respond to emerging requirements. An effort should be made, too, to concentrate on retaining core business competencies and outsourcing those functions that are readily available from external sources.

Successful outsourcing depends on close attention to contract requirements, good communication with vendors, and careful oversight of contract performance. When determining whether to perform work in-house or outsource it, follow a solid business model. Cost should not always be the determining factor. At a minimum, consider the following:

- ***Off-the-shelf vs. unique product*** — If this is a need common to many organizations, it is probably cheaper to outsource. In the case of a unique requirement, the answer may not be so simple.

- ***Recurring vs. one-time requirement*** — If this is going to be a long-term requirement, it might be advantageous to develop the capability to do it in-house. Consider outsourcing pieces or have a contractor train in-house personnel to perform the work.

- ***Size and capability of in-house resources*** — Can existing staff do the work without costly retraining? Can personnel be added or detailed from other organizations?

Many organizations have arrangements with colleges and universities to deliver courses on-site, either with local

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faculty or through satellite networks. These arrangements have enhanced learning value because faculty gain knowledge about the agency, and employees build networks and alliances that endure back on the job.

Explore the possibility of partnering with one or more organizations that have the same need. This approach is particularly useful when training is needed but there are not enough employees to justify holding a class. Various types of partnerships exist. Some are very formalized and involve complex arrangements; others can be quite simple.

A Success Story

One example of a successful partnership that does not involve financial complexities is the Hawaii Joint Training Board. After developing their own annual training plans, member agencies meet and identify common needs. They look for training courses that have enough demand to justify holding a class. They then publicize the type of courses they plan to host. A consortium member organization provides classroom space on a rotating basis. A vendor is competitively selected to provide the training. Payment is made directly to the vendor by the organizations that send employees to training. As a result of the consortium, these organizations are able to attract top-notch training vendors and do it at a reasonable cost and without a lot of bureaucracy. Federal agencies in Guam and Japan have set up similar partnerships.

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Use the Ideas of Others

In the pressured environment in which most government managers find themselves, the need for effective responses to organizational challenges is constant. Need a new training program for your employees in two weeks? Want to develop a mentoring initiative ASAP? Or a strategic plan by the end of the month?

"Learning is a willingness to let one's ability and attitude change in response to new ideas, information, and experiences."

— Peter Vaill

The time and resources to develop responses are limited, but managers rise to the challenge every day. Often, the successes of others can be adopted or adapted to your needs, saving time, effort, and money. The objective is accessing what other agencies have accomplished in terms of policies, programs, products, and experience. Networking is the key. The media for this networking range from quick phone conversations to surfing the Web for the right home page to attending a professional society's monthly meeting.

The HRD office in your organization should maintain contacts with sister HRD offices in other agencies. In addition, encouraging your own staff to participate in professional activities — and doing so yourself — to meet colleagues in government and the private sector is an investment likely to pay substantial returns.

Sample Policies, Programs, and Products

The resources within the government community are vast. And, best of all, excellent advice, ideas, and resources are free. Following are examples of policies, programs, and products developed by various federal agencies that could be useful to you and your organization. Bear in mind that this is only a sampling, and there are many more examples out there. Also, various bulletin boards and on-line services can get you and your staff quick access to new, useful information and networks.

> *"Learning is too important to leave to chance."*
>
> **— Fred Kofman and Peter Senge**

- ***National Instructor System*** — The Bureau of Alcohol, Tobacco, and Firearms, Instructor Systems Branch, has an accredited instructor training program open to colleagues in other public service agencies. Attendees learn how to develop, deliver, and administer training in workgroups and in the classroom.

- ***Bartered Consultant Services*** — The Federal Aviation Administration (FAA), Human Resources Services Division, Great Lakes Region, shares its expertise in reengineering, self-managed teams, benchmarking, automation, training, etc., in return for consultant and training services from other agencies and FAA regions.

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- ***Process Consultation*** — Organizational development consultants in FAA's Great Lakes Region observe managers and/or teams as they hold meetings. Their role is to help assess strengths and weaknesses, and determine how to effect positive change.

- ***Mentoring Program*** — The Training Academy of the Department of Housing and Urban Development pairs voluntary mentors and employees; training is provided for both parties, and a memorandum of understanding is provided to clarify responsibilities in the mentoring relationship and ensure career enhancement.

- ***Curriculum for Change*** — This Department of Transportation HRD effort is a comprehensive curriculum for change management with a three-tier learning and development framework: (1) dynamics of transformation, (2) assessment against desired performance dimensions, and (3) individual learning and development opportunities for nine critical elements. The curriculum is used to prepare employees for changes in the work environment as a result of reengineering and downsizing.

- ***Quality of Worklife Strategy*** — This comprehensive strategy from Health and Human Services was developed at the Department level in response to concerns about employee commitment and morale during a period of tremendous change and uncertainty. The strategy has three objectives: (1) increase employee satisfaction, (2) strengthen workplace learning, and

(3) better manage ongoing change and transition. The strategy includes a wide range of initiatives to improve communications, become a learning organization, and promote family-friendly workplace programs.

★ ***Action Work-Outs*** — The U.S. Air Combat Command (ACC) uses the work-out technique pioneered by GE to rapidly reengineer its work processes. (Work-outs are a form of organizational learning described on p. 20.) In "action work-outs," teams of ACC employees are assigned to analyze their work processes within one week's time and to present their recommendations for change to top managers. Their changes helped ACC set new records for efficiency — for example, slashing the time it takes to inspect B1-B bombers by 42 percent, and cutting in half the time it takes to get F-15 fighter jets ready for combat.[24]

★ ***Mentoring Handbook*** — The Department of the Navy developed a comprehensive handbook to support its agencywide mentoring program. Developed by a workgroup of the Navy Civilian Leadership Board, the handbook covers: (1) questions and answers about mentoring, (2) the stages of mentoring, and (3) building mentoring skills. The handbook is part of a training program provided to all mentors and employees.

★ ***Training Policy Handbook: Authorities and Guidelines*** — This Office of Personnel Management publication covers essential legal information managers and practitioners need in making decisions about establishing, funding, implementing, and evaluating

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HRD programs. Easy to read, it summarizes the legal foundation of training and provides legal references by topic area.

- ***TEAM Handbook*** — This Department of Education publication was developed to help employees understand teams and move to a team-based structure. Managers use it to decide whether to establish teams and as a guide for effectively overseeing and developing teams. Employees use it to understand the different types of teams and team dynamics.

- ***Human Resources Strategic Planning*** — The Defense Information Systems Agency (DISA) has developed a Human Resources Strategic Plan. Through this process, key human resource imperatives were identified that were aligned with DISA's mission and corporate goals. The document serves as a roadmap for the organization and provides a clear rationale as to why human resource programs exist, and how they relate to the vision and mission of the organization. The plan allowed DISA to set priorities for training across the organization and assign resources accordingly.

- ***DOT Connection*** — This one-stop customer service center was created by consolidating three different centers that provide service to the entire Department of Transportation. The center offers a variety of employment, career development, and worklife services to help balance work and personal responsibilities. These

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services help managers and employees gain the tools they need to enhance their development and benefit their organization. Other federal agencies can take advantage of these services on a fee basis.

- ***PTO University*** — The Patent and Trademark Office (PTO) has partnered with several local colleges and universities to provide a series of academic programs designed for PTO employees. All courses are funded by the agency, held at the agency's offices, and aim to help employees in future career paths at PTO. Counseling, tutoring, and peer assistance programs are available to all students.

Federal Learning Technology Resources

Technology can increase the power and efficiency of learning many times over. Satellite networks can broadcast across great distances, bringing top experts into the workplace for just-in-time training. Computer-based instruction sits resident at employee workstations until it is needed. While technology requires a large upfront investment, the payoffs to management are well-documented. Many federal organizations have made major investments in technology

> *"In a time of drastic change, it is the learners who inherit the future. The learned usually find themselves equipped to live in a world that no longer exists."*
>
> **— Eric Hoffer**

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and have created centers of excellence. You will find them very willing to share their lessons learned and — very often — their resources as well. Here are some examples of agencies' technology-based delivery systems.

Agency	Resources
Agriculture	• Cooperative State Research, Education and Extension Service
Central Intelligence Agency	• Federal Language Training Laboratory
Commerce	• National Technical Information Service • National AudioVisual Center • FedWorld • Census Bureau Educational Services Branch Multimedia Center
Defense	• Air Force Institute of Technology Center for Distance Education, Air Technology Network Defense Training and Performance Data Center • DOD Distance Learning Action Team • Center for Software (Defense Information Systems Agency joint effort) • National Defense University • Defense Acquisition University
Education	• Skills Assessment Center • Technology Resource Center • Educational Resources Information Center (ERIC) • Special Education Software Clearinghouse

Agency	Resources
Energy	• Training Resource and DataExchange (TRADE)
Environmental Protection Agency	• EPA Learning Laboratory • Safety, Health and Environmental Management Division Multi-Media Library
General Accounting Office	• Learning Center • Video Teletraining
Health and Human Services	• Center for Substance Abuse Prevention: CTS Staff College • Public Health Service: Instructional Television System • MED Training Programs • Multi-Media Learning Center • National Library of Medicine Multimedia Laboratory
Housing and Urban Development	• Satellite Training Network
National Aeronautics and Space Administration	• Classroom of the Future
Small Business Administration	• Online Training Guides • Americans Communicating Electronically (ACE) • Government SysOp Organization

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Agency	Resources
Social Security Administration	• National Satellite Network (NSN)
State	• National Foreign Affairs Training Center
Transportation	• Federal Aviation Administration: Interactive Video Teletraining
Treasury	• Customs Service: Video Training Center • IRS: Electronic Performance Support Systems

6 | Keep an Eye on the Future

Coping with today often seems an overwhelming challenge. But looking out at the horizon, anticipating needs, and projecting solutions are what it takes to get a bigger share of available resources and to keep your employees from being swamped by new workload demands. Taking time to scan the horizon and identify future trends that will affect your organization may appear to be an impossible luxury. But much of this work has already been done for you. Let others identify the trends and tools of tomorrow while you dedicate your time and energy in applying them to your situation.

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BusinessWeek, *Forbes*, *Fortune*, *The Government Executive*, and *Harvard Business Review* are among the many magazines that run articles on trends and ideas for the workplace of the future. Newspapers such as *The Wall Street Journal* and *The Washington Post* also have good articles on these topics. These are tailored for busy managers, and take little time to read and digest. You can access some of these resources on-line, or from your agency or public library. You could also ask your HRD office to collect articles and bring them to your attention. Then you will both be learning the same information on improving workplace performance.

Learning Trends

Here are some key trends business and work experts are saying will have an impact in the near future. How do you think they will reshape your world and that of your organization?

1. *As government becomes customer focused, it will become extremely important to learn ways to get feedback directly from customers served, not only on past performance but for future needs.*[25]

2. *Learning how to learn will affect what people learn, how they will learn it, and how they will apply it. Challenging assumptions, values, and how work gets done results in very different learning approaches than "information dump" and passive learning methods.*[26]

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3. *Career paths are focused outward rather than upward. Employees take responsibility for their own learning in order to leverage themselves in an environment when downsizing and flattening restrict upward mobility.*[27]

4. *The training trend that is expected to have the biggest effect on the organization is just-in-time training, or training accessible to the employee at the very moment it is needed to do the job.*[28]

> *"Learning and performing will become one and the same thing. Everything you say about learning will be about performance. People will get the point that learning is everything."*
>
> **— Peter Block**

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